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31 July 1958

Chief, Headquarters Training

Chief Instructor, Information Reporting,  
Reports, and Requirements

General Report on Reporting Courses

1. The present course in Information Reporting, Reports, and Requirements was developed for three reasons: first, to improve the quality of reporting and consequently of information values in reports; second, to train case officers and field reports officers so that the finished information report could be prepared in the field; and third, to improve the practices of headquarters reports officers, particularly in editing and in furnishing guidance to the field case officer through requirements and evaluations. There has been noticed some improvement in the quality of reporting. All case officers and field reports officers taking the course have demonstrated ability to make finished information reports. Case officers also know what they and their agents through them should expect by way of headquarters guidance; they have at least basic ideas on what a reporter is, how he can be developed, what his job is like as an information collector, and what his responsibility is for the fast delivery of assigned information so organized and expressed as to be immediately usable. So far the course has signally failed in budging senior headquarters reports officers from individually patterned procedures too often with the authority of habit only. These patterns also are likely to involve no organization of information in reports unless the matter was attended to in the field, incoherence in expression, and casual processing and fortuitous delivery of reports.

2. The attempt of the course to cover so much ground grew out of its development. Under date of 27 January 1956, [redacted] then DC/RQM, as the result of several months spent at OIR, submitted "for comment by recipients" an "Outline of Proposed Course for Reports-Officers." As the title indicates, the proposed course concerned itself almost wholly with reports officers. Mr. [redacted] some little time later but as the result of the same TDY at OIR produced a paper titled "Improving the Reporting Function in FI." The emphasis here is on the field case officer as a reporter. The paper was distributed under date of 8 February 1957 as an attachment to a memorandum for chiefs of operating divisions under the subject "Positive Reporting Competence in Operational Personnel." The memorandum was signed by [redacted], then acting chief, FI.

3. For some years, a course in information reports and reporting had been a going concern in the FE division. It had been started because of dissatisfaction with the offerings of OIR in such training. Originally,

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under Mrs. [REDACTED] it had been a laboratory course in the processing of headquarters information reports based on live field reports. When I took over the course on 31 January 1955, I continued it as on-the-job training. Not until the course was expanded to include reporting by case officers were there any talks given. Then the talking was limited to the briefing necessary in assigning the collection of information to individual case officers in preparation for their reporting problems. The course was conducted, not only as a laboratory one, but also as a tutorial one. There were five working spaces in the training room, and a student could start whenever there was a desk and a typewriter available. From 31 January 1955 to 1 June 1956, with one month lost to vacation, 102 FE students were enrolled for an average stay of three weeks. Sixty-six of the students were operations officers.

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4. In April of 1956, Mr. [REDACTED] came to see me with the suggestion that I put into operation at OTR the course that he had developed in preliminary form. When I in turn suggested that his course be modified so that at least half the time was spent in actual production of reports and so that it was aimed at operations officers, he readily agreed. As a result, soon thereafter I was interviewed by DC/OTR and C/OS together. Near the end of the interview, I was instructed to get my release from FE as soon as possible and to report to OTR to take charge of all instruction in information reporting and reports. I was to finish developing the headquarters course and to be its chief instructor. When I did report to OTR, I quickly discovered editorial duties assigned me would take up all of each day. I had no standing even as an advisor in the reporting instruction at [REDACTED]. Far from being in charge of all reporting instruction, I was not even the chief instructor in the course I was to develop. Dr. [REDACTED] already had been installed as the associate chief instructor - two chief instructors for a course the student enrollment of which was to be set at eight persons. Subsequently there were two hindrances to the organization of the course into an organic and productive whole. First, the three reasons for running the course resulted in the division of each class into two groups, each with a somewhat specialized schedule. Emphasis for operations officers was on reporting; emphasis for reports officers was on processing field information reports. Second, with [REDACTED] exclusively responsible for instruction in requirements, there was a tendency to disassociate that subject from the rest of the course and to insist that due recognition be given to it by assigning it as much time as was assigned to reports and reporting together.

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5. [REDACTED] and I on 22 June 1956 met with Mr. [REDACTED] and other members of the HQM staff to consider the tentative schedule for the first session of the INRR course. The meeting produced the suggestions that each class be limited to eight students; that emergency needs of individuals for instruction be met tutorially; that requirements problems be integrated into the reporting assignments

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of operations officers; that every effort be made to play down any tendency to cleavage between operations and reports personnel; that the policy in the use of live material for reports be established by DDP. The opening class, 13-31 August, had an enrollment of 10 students; each operating division was represented; and the scheduled time was about evenly divided between classroom instruction and production in the laboratory.

6. As has been indicated, it had been hoped that the course would improve the quality of reporting, would develop sufficient editorial skill in field case officers and reports officers to permit the transfer of main editorial functions to the field, and would improve the practices of headquarters reports officers to the point where their competence would permit them to give <sup>adequate</sup> competent and continued guidance to field personnel concerned with reporting. As indicated, too, there has been evidence of some improvement in information reporting. All field personnel who have taken the IRRR course know how to put together in final form, the basic information reports, cable and pouch. From the first class on, it became increasingly apparent that only in rare cases could the established, individual practices of senior and chief reports officers be changed to conform with those, in one form or another, officially set up. Invariably time for headquarters reports officers had cut patterns for information reports that were right, inflexibly right, regardless of how many official regulations and memoranda they violated. Students in IRRR were taught to process reports in compliance with official directions. On return to area desks, however, time and again they were told by a chief reports officer or a senior reports officer, without training himself, to pay no attention to what they had learned in the IRRR course because "we do not do reports in that way here." The only recourse for instructors was to tell dismayed students to go along with area desk practices, good or bad, until they got on their own in the field. Then as field officers they could make use of the official direction that had been given them in the IRRR course and stop trying to satisfy the whims of individuals. It was hard to resist the temptation to tell students that the whims were of persons promoted to reports officers only because of experience in typing information reports. Naturally with the encouragement of headquarters reports officers, some disgruntled students back at their desks wrote adverse criticism of the course. Most students, particularly operations officers and young reports officers, reacted favorably to the training.

7. On 15 August 1957, the C/RQM/RC handed me at a meeting of the RQM staff carbon copies of "Division suggestions on the IRRR course." The "suggestions" turned out to be memoranda from area division chief reports officers critical of the course. They were in most cases generalizations of the complaints of poor students and defenses of division practices in the processing of information reports. When one suggestion did not cancel out another in the same memorandum, one entire

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memorandum cancelled out another. For instance EE wanted more emphasis on the "philosophy" of reports; WE wanted more emphasis on "factual procedures." Had the suggestions been generally adopted, there would have been more reporting courses than there are area divisions. When there was agreement and merit in suggestions, they were immediately incorporated into the course. Nevertheless on 18 December 1957, the C/RQM/RC started organizing meetings among "OTR, FI staff, and division officers for the purpose of discussion of the IRRR course." He also undertook "RC monitoring of the course." By 6 January 1958, he had written to the FI training officer, "Re our IRRR meetings - in the absence of decision otherwise, I am instigating individual division meetings. This should start as soon as vacation jitters cease." Not much later, I learned that the meetings were under way when division training officers came into my office and sat down with tutorial students and the announcement that "they would be pleased to call the whole damn business off" but they had been called to meet in 204, [redacted] to "criticize" the IRRR course. That was the closest the chief instructor came, not only to attending the meetings, but to knowing what was going on in them and getting a chance to defend the course. This I do know however. As the meetings progressed, attendance in the course fell off. About the time that a proctoring report of the course by [redacted] addressed to Chief, RQM/RC, dated 19 March 1958, and an announcement by the FI training officer that as a result of the meetings the IRRR course would be reduced in time to two weeks, enrollment had reached a low of three students. The three students were taught tutorially, a most effective but expensive method with the ratio of one instructor to one student. I am attaching a copy of part of a three-weeks course report, the proctoring report, and my reply to it so that the contents of all three will be available to you during your digest of this report.]

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8. In its continuing development, the course has been kept flexible. Content has been varied as need for adaptation to changing circumstances and groups of students became apparent. Emphasis, too, has been shifted as the need for shift arose. The changes are apparent when the schedule of class No. 1 is compared with that of class No. 15. The first class was divided into two groups - A, reports officers; B, operations officers. The morning of the first week were given over to talks on reports; the afternoon, to reports processing in the laboratory. In morning of the second week, A group got classroom instruction in requirements and in special reports; B group, in reporting. Afternoons were spent by both groups in processing reports. B group put in most of the third week on observation and reporting problems; A group, in processing reports. The schedule for class No. 15 shows a quite different approach, a more realistic one. First, there was no division of the class into groups; all members got the same instruction. Lectures on the reporter's job were followed by what guidance he could expect through requirements and evaluations and particularly what part requirements should play. Then, still in the first week, came basic methods of collecting information and their application in reporting information on guidance practices at area desks. The second week was given over to further instruction in reporting, with the bulk of the time to the preparation of

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information reports of all sorts. The laboratory work included, besides the processing of CS reports into the final form, the preparation of cable information reports from material gained by observation. The third week was devoted to the collection of information and its organization and expression in final reports form and the re-editing of current field and CS reports. It is evident from examination of the two schedules that the course in its last session was geared to the needs of the field case officer and his teammate, the field reports officer. The headquarters reports officer is concerned only as he should be in a position to supply guidance to field officers as the actual producers of information. This schedule reflects what really happens in reporting. The reporter has a job to do; he is guided by an assignment; he collects the assigned information; he puts it into a report that communicates the information effectively; and the headquarters reports officer, freed of editorial detail, furnishes further guidance by evaluating the information and by getting the customer to do so and to furnish additional requirements that can be tailored into assignments. The first step in the improvement that the instruction staff feels has come to the course resulted from the integration of requirements into the reporting. The second came with the maintenance of flexibility. The third came with the gradual elimination of two groups and the orientation of the course primarily to the needs of the field case officers and field intelligence officers. It took almost two years of course development to arrive at complete realization that changing the established practices, bad as they may be, of the senior headquarters reports officers is hopeless.

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9. In an attempt to relieve the strain both on the IRRR course and on administration students themselves, a familiarization course in reports was set up especially for small groups of them. Reporting and requirements were eliminated. Miss [REDACTED] and I during the 1957-58 academic year have lectured the groups on the mechanics of CS and cable information reports preparation. All have been taught how to use the combination field and headquarters form. Miss [REDACTED] has supervised, for the most part, the laboratory sections, in which plenty of practical exercises have been carried out. During the year, the course has been offered three times with a full enrollment of at least six students each time. It has been scheduled for two weeks, afternoons only. There have been no complaints from any source that the course is not achieving its purpose of preparing field administrative assistants to type information reports in the final form and at the same time to check on organization and expression. The course also relieves the IRRR course of the need for undue consideration of the clerical side of reporting.

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10. As an extracurricular activity closely allied with information reports, again with Miss [REDACTED] help, I have conducted the Cable Refresher course four times during the year primarily covered in this report. I have talked to each class for an hour on the organization of the information in cables and for an hour on expression. Miss [REDACTED] has spoken for an hour each time on cable and cable information report format. The Signal Center has supplied speakers on the technical considerations involved. The average attendance in the half-day course has been 54 students.

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11. About 15 weeks of the year were filled with regularly scheduled reporting classes. During the remainder of the time, 30 tutorial students got instruction for periods ranging from one to three weeks. There were 11 briefings lasting one or two days and therefore too short a period of time to permit evaluation of students' performance. Most of the tutorial instruction I did. In addition, 16 foreign nationals were briefed, 12 of them by Miss [REDACTED]. Miss [REDACTED] gave a week of covert training to one student. I have lectured each CE Operations course class for two hours on clarity of communication through adequate organization and expression of information. Miss [REDACTED] has started at least three scripts for training films. All in all, the instruction staff has kept busy.

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12. On 9 June, the C/BQM/RC said that the best possible estimate he had been able to arrive at for future registrations in the IRHR course was 10 students per class. If past experiences are criteria, 10 registrations will dwindle because of cancellations to 7 or fewer students actually present when the class starts and through withdrawals to even fewer when it ends. For the last three sessions of the IRHR course, the registrations have been 10 students in each, but cancellations lowered enrollment in the first class to six students; the second, to three; and the third, to six. However this drop in enrollment may have been caused, the fact that future classes probably will level off at maximum enrollments of 10 students needs to be faced. It is possible that all of three causes may have contributed to the drop in enrollments from an average of 15 students to an average of five. First, the deadline for getting the field stations ready to prepare information reports in the final editorial form has been reached and passed. To ready field operations and reports officers for this job, as has been said, was a main reason for establishing the course. Second, the meetings instigated by the C/BQM/RC gave at least a connotation of official recognition to the gripes of about half a dozen disgruntled students, one in particular. Third, the FI training officer announced modifications of the course as a result of the meetings. Division training officers and others have been waiting to enroll students until the modifications go into effect. The particular fact that must be faced, though, is that the expense of three instructors to teach a class of six students is expensive beyond reason. Ten students, taught for the most part individually in the laboratory as they are in IRHR, would justify two instructors. Three instructors are needed for such classes enrolling 15 to 20 students. Since in the future the enrollment expectancy of IRHR seems to be about ten students in a class, since the course is to be directed to case-officer training mainly, and since most case officers already will have received some basic training in the operations course, I have some definite modifications of the IRHR course to recommend.

a. Enrollment should be limited to 10 students.

b. The course should have as its primary aim the teaching of reporting and reports and an applicable amount of requirements and

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evaluations to the field case officer. Consideration of requirements and evaluations should not become an intellectual exercise such as was the case once in course and still partially is.

c. As a producing partner of the case officer, the field reports officer should be accepted into the course. Beginning headquarters reports officers should be registered in the Reports Familiarization one. For senior and chief headquarters reports officers periodic series of meetings of the seminar kind should be set up.

d. Only for familiarization with field practices would the headquarters reports officer be accepted.

e. All instruction in specialized headquarters forms, techniques, and practices should be eliminated.

f. For the most part, students would be trained by doing realistic jobs of collecting their own information and processing it into the final form of the information report, both cable and pouch.

g. Lectures should be kept to a minimum, and practice in doing the reporting job should be expanded.

h. With such limitations the course could well be given in two instead of three weeks.

i. Miss [REDACTED] since she is not interested in working with students in the laboratory (she refers to it as baby sitting), should be released for the type of work that she does find interesting. Miss [REDACTED] has a keen interest in supervising student production in the laboratory, was assigned to it, and is more competent at it than is Miss [REDACTED]. She should be retained as laboratory instructor, since it is in the laboratory that most of the work would be done in the re-directed course. Miss [REDACTED] would continue to help in the Cable Refresher course and also continue to direct the laboratory in the Reports Familiarization course. I could easily do the necessary briefing in requirements and evaluations, where Miss [REDACTED] activities have been.

j. All but one guest speaker could well be eliminated. Guest speakers in IERR have been of little value except to impress students with position.

13. I would recommend an over-all general curriculum that would include only discussions of and practices in the following activities: getting an assignment, collecting information, organizing information, communicating information, delivering information, putting information into final form, evaluating reports, distributing reports. The instruction could well be contained within two weeks.

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**First Day**

The reporter's job and his guidance  
The briefing on requirements

**Second Day**

The reporter's qualifications and development  
The use of evaluations  
Methods of collecting information  
Collection of information on area requirements

**Third Day**

The raw report  
Writing the raw report and processing it into final form  
The basic information report and the thinking behind its use

**Fourth Day**

Observation for cable report  
The cable information report  
Writing the cable

**Fifth Day**

Processing CS reports material  
Briefing for observation problems

**Sixth Day**

Observation

**Seventh, Eighth, Ninth, Tenth Days**

**Laboratory**

14. In lieu of the two-weeks IRRR course, students could be given practice in reporting and reports on the tutorial basis, generally for two weeks, as was done successfully for years in the FE division. The instruction would be tailored to the individual. A maximum of three students would be accepted each Monday during 11 months of the year. In terms of trained students the number in a year might well exceed that of 1957-58 produced by the formal IRRR course. From 31 January 1955 to 1 June 1956, one instructor in the FE division trained 102 FE students in this way.

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